



Market Observations/Crop Comments

Seed movement over the past sixty day has been average at best. We suspect this is a combination of weather, early shipments, continued availability of carryover seed, competitive pricing at the primary level, and the cost of money. With the US consumer's purchasing power down, and interest rates up, it is likely that end-user consumers, seed applicators, as well as resellers are all becoming more price sensitive and reluctant to carry more inventory or buy more than they need. Also, transportation from Oregon is running smoothly and quickly, although still not cheap.

This combination seems to be creating an ordering environment that focuses on low-inventory and just-in-time purchases with limited forward bookings. So far, the strategy has put additional pricing pressure up the supply chain. Some commodities, such as KY-31 and annual ryegrass have softened after strengthening earlier. In general, forage perennial grasses movement - orchardgrass, fescue, and perennial ryegrass - has been fair. The primary perennial turf species - ryegrass, tall and fine fescues, and Kentucky bluegrass remain available and soft, with average movement.

The one cool-season seed segment contrary to the above is perennial clovers, especially white, Dutch, and ladino clovers. Consumption continues to be steady to strong, and prices have strengthened in advance of foreseeable short crop and no let-up in demand.

Turning our attention forward, we anticipate fall consumption levels to be similar to pre-COVID years, where the overall picture is a composite of each region's weather patterns. For example, where there has been sufficient moisture and some disease damage, overseeding should be good - softer prices have helped. In contrast, where drought continues, or where lawns and pastures look too green, seed usages will be down, or at least delayed till the rains come. Also, regions with good new home and infrastructure construction should have steady consumption.

Out West, seed companies and farmers are turning some of their attention to fall plantings. We are seeing an increased interest in planting rotation crops, including clovers, radish, wheat, winter peas, and some annual ryegrass. Some of these rotations are due to plow-outs of tall fescue and perennial ryegrass acres, others are to help obtain cleaner annual ryegrass stands, especially where volunteer ryegrass growth has hindered quality.



Growers with non-irrigated acres count on a good rain to get the volunteer seeds to sprout so as to get a chance to spray undesirable volunteer seed before drilling. It has been dry out West, but as of this writing, it is raining. Hopefully, it will be good enough, as we all like a nice clean crop at harvest!

Keep Gray Leaf Spot in Check

If you service a region prone to gray leaf spot in perennial ryegrass, be sure to offer your customers varieties which help reduce susceptibility. This is one of those diseases that can really devastate a lawn. Both our Signet and Shield varieties provide improved resistance to gray leaf spot, as well as many other diseases including crown rust, red thread, and pink snow mold. Additionally, both are very attractive dark green, and ideal for straight overseeding as well as mixing with other species. Contact your Smith Seed Representative for current pricing and availability.

